

Hall of Records
Commission

to be Submitted to the Records Management Division

Hall of Records Commission

PAGE
NO. 1.

1. Requesting Agency

REGISTER OF WILLS - BALTIMORE CITY

2. Division or Bureau of Requesting Agency

3. Authorization Requested (Check only one of the squares below).

☐ A Dispose of present accumulation. No additional accumulation is anticipated. Records have ceased to have value to warrant retention.

☒ B Establish retention schedule for records for which there is a continuing accumulation. The records will cease to have value to warrant their retention after the period of time indicated.

☐ C Microfilm and destroy originals. Originals if not microfilmed would be retained for the period of time indicated.

4.
Item
No.

5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation
of Hall of Records
and Board of Public
Works.1. RECEIPTS

A 5" x 11" prenumbered receipt is prepared in quadruplicate for any money received by the Register, except money received from joint accounts (See Item 2). The copies of the receipt are distributed as follows:

1. payee
2. cashier
3. remains in receipt book
4. office auditor

The cashier's copy is filed chronologically. From it the cashier posts to the Cash Receipt Book, which is a permanent record. This copy of the receipt is necessary for audit by the State Auditors. The yellow copy which remains in the receipt book is also used by the State Auditors.

The copy used by the office auditor has no value after the books have been balanced daily. This copy is non-record within the meaning of the statute governing non-record material (Art. 41, Sec. 155, Annotated Code of 1951). The recommendation below applies to the cashier's copy of the receipt and the copy remaining in the receipt book. These two copies occupy an estimated 10 cubic feet for the period 1947 to date. A receipt form used prior to 1947 occupies an additional 10 cubic feet in the basement vault. An estimated 12 cubic feet of material will be destroyed upon approval of this schedule.

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER AND THEN DESTROY.

*Approved Hall of
Records Commission*

7. Agency, Division or Bureau Representative

Leroy C. Shaughnessy
Signature*Register of Wills*
Title*Dec. 7, 1954*
DateSchedule Authorized as Indicated in Col. 6 by Hall of
Records Commission.Disposal Authorized as Indicated in Col. 6 by Board of
Public Works.*December 10, 1954*
Date*Miriam S. Radloff*
Archivist*DEC 14 1954*
Date*J. McE...*
Secretary

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

SCHEDULE
NO. 112
PAGE
NO. 2.

Hall of Records
Commission

4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
2.	<p><u>JOINT ACCOUNT RECEIPTS</u></p> <p>Cash, Securities, bonds, etc. held jointly by the deceased and his survivors are subject to the inheritance tax. The receipt for this tax is prepared in triplicate and distributed as follows:</p> <ol style="list-style-type: none"> 1. to the payee 2. office auditor 3. cashier <p>Both copies retained by the Register of Wills are necessary for audit purposes. The office auditor's copy is filed in numerical order. The Cashier's copy is filed chronologically and has the voucher attached. This material occupies 10 cubic feet for the period 1938 to date. The recommendation below applies to both copies of the receipt and the attached voucher. Approximately 7 cubic feet will be destroyed upon approval of this schedule.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.</p>	<p><i>Approved Hall of Records Commission</i></p>
3.	<p><u>PAYROLLS</u></p> <p>The payroll is prepared in duplicate on 8½" x 21" sheets. One copy is retained by the cashier; the other is forwarded to the Employee's Retirement System. The payroll information is duplicated and retained permanently in the Cash Disbursement Journal. The payrolls are necessary for audit. They occupy 2 cubic feet for the years 1942 to date.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.</p>	<p><i>Approved Hall of Records Commission</i></p>
4.	<p><u>INVOICES</u></p> <p>Vendor's invoices are filed chronologically, there are no attachments, the check number and date of payment is noted on the invoice itself. The particulars regarding the payment and the check number are recorded permanently in the Cash Disbursement Journal. The invoices are necessary for audit. They occupy 3 cubic feet for the years 1945 to date.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.</p>	<p><i>Approved Hall of Records Commission</i></p>
5.	<p><u>CHECKS</u> <u>CHECK STUBS</u> <u>BANK STATEMENTS</u></p> <p>Cancelled checks and bank statements are recapitulated with the Cash Disbursement Journal as they are returned. The three items are</p>	<p><i>Approved Hall of Records Commission</i></p>

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REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)SCHEDULE
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4. Item No.	5. Description of Records Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.	6. Recommendation of Hall of Records and Board of Public Works.
	<p>necessary for audit purposes but have no value thereafter. They occupy 3 cubic feet for the years 1945 to date.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.</p>	
6.	<p><u>DEPOSIT SLIPS</u> <u>BANK RECEIPT</u> <u>INTERNAL AUDITORS RECEIPT</u></p> <p>These three items are used for depositing receipts of the Register of Wills. The internal auditors receipt is given to the cashier at the time he accepts the money for transfer to the bank. The deposit slip is the usual slip used by any depositor. The bank receipt is prepared by the bank showing amounts and is signed by the teller. These three items occupy 2 cubic feet for the years 1945 to date.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.</p>	<p><i>Approved Hall of Records Commission</i></p>
7.	<p><u>RECEIVING WARRANT</u></p> <p>This copy of the Treasurer's Receiving Warrant is included in General Schedule No. G-4, Item 3, approved at the May 10, 1954 meeting of the Board of Public Works. The approved schedule states that the agency copy of the receiving warrant shall be retained for three years or until audited, whichever is later, and then destroyed.</p>	<p><i>Approved Hall of Records Commission</i></p>
8.	<p><u>APPEARANCE FEE CARD</u></p> <p>This postal card is a printed notification to an attorney that his fee for appearance before the Orphans' Court is being held for him by the Cashier. The card is signed by the attorney and serves as a receipt. The cards occupy 1 cubic foot for the period 1942 to date. The annual rate of accumulation is 6 linear inches.</p> <p>RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.</p>	<p><i>Approved Hall of Records Commission</i></p>
9.	<p><u>MONTHLY REPORT OF THE REGISTER OF WILLS TO THE COMPTROLLER OF THE TREASURY</u></p> <p>This 8$\frac{1}{2}$" x 11" form is a notarized monthly statement embracing all sums of money received for and on account of the State of Maryland. The form also shows the distribution of the money. It is prepared in quadruplicate and distributed as follows:</p> <ol style="list-style-type: none">1. Comptroller of the Treasury2. Cashier3. Register of Wills4. Office Bookkeeper <p>The bookkeeper's copy is considered non-record within the meaning</p>	<p><i>Approved Hall of Records Commission</i></p> <p>FILED BY BOARD OF PUBLIC WORKS DEC 14 1954 <i>J. Mc... ..</i> Secretary</p>

REQUEST FOR RECORDS RETENTION SCHEDULE
(Continuation Sheet)

5. Description of Records

Describe records accurately. Include title, form number, size of documents, work or activity to which the records relate, inclusive dates, and quantity (cubic or linear feet). Show recommended retention period.

6. Recommendation of Hall of Records and Board of Public Works.

4.
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of the statute governing non-record material (Art. 41, Sec. 155, Annotated Code of 1951). The recommendations for the Cashier's and Register's copies are:

A CASHIER

RECOMMENDATION: RETAIN FOR THREE YEARS OR UNTIL AUDITED, WHICHEVER IS LATER, AND THEN DESTROY.

B. REGISTER OF WILLS

RECOMMENDATION: RETAIN FOR TERM IN OFFICE AND FOR THREE YEARS THEREAFTER, THEN DESTROY.

10. REGISTERED MAIL RECEIPT

The Register of Wills received a standard post-card form indicating that the addressee has received registered mail. These occupy 4 cubic feet for the period 1951 to date.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

11. NOTICES TO RECORDING CLERK TO MAKE ENTRIES IN THE PROCEEDINGS

The recording clerk received notice from the various departments of the Register's office to make entries in the Proceedings Journal. The notices include recordation of will filed, letters testamentary filed, order to convey, etc. After recordation the notice has little or no value, there has been no reference to them. They are maintained in chronological order and occupy 4 cubic feet for the period 1950 to date.

RECOMMENDATION: RETAIN FOR THREE YEARS AND THEN DESTROY.

12. CORRESPONDENCE

This file consists of correspondence with individuals, attorneys, various state and county agencies, other states, etc. It is concerned with the functions of the Register of Wills. The file occupies 7 drawers (11 cubic feet) for the period 1949 to date. Correspondence for the years 1943-1949 occupies 10 cubic feet in the basement storeroom. Approximately 10 cubic feet of material will be destroyed upon approval of this schedule.

RECOMMENDATION: RETAIN FOR THREE YEARS AFTER THE EXPIRATION OF EACH REGISTER'S TERM IN OFFICE, AND THEN DESTROY.

*Approved Hall of
Records Commission*

*Approved Hall of
Records Commission*

*Approved Hall of
Records Commission*

APPROVED BY
RECORDS WORKS
DATE DEC 14 1954

Melissae
Secretary